



## Partnership Symposium Agenda

with Ron Shevlin serving as event host

October 1, 2008

---

8:00 am – 9:00 am  
Foyer

**Registration | Breakfast sponsored by Baker Hill | Networking**

9:00 am – 9:15 am

**Welcome & A Look Forward – Ron Shevlin, Event Host**

9:15 am – 10:00 am  
FORUM A

**Young & Free – Attracting New, Young Members**

**Tim McAlpine, President & Chief Strategist, Currency Marketing**

*We all want new members, especially those with many years of borrowing, depositing, and investing ahead of them. Tim McAlpine will share the grass-roots approach one credit union is using to engage the youth market. He'll share the process, phases, and results of Common Wealth CU's Young & Free Program, as well as provide insight into how they have solved some unforeseen issues that have come up during the campaign. Learn from Tim's experiences with the Young & Free Program how to better attract younger members to your credit union.*

10:00 am – 10:45 am  
FORUM A

**Brand Positioning: Cascade Community Credit Union**

**Jeff Stephens, CEO & Brand Director, Creative Brand Communications**

*In this look at Cascade Community Credit Union, Jeff illustrates positioning through advanced branding tactics, why trying to be "different" is more effective than trying to be "better," and how to avoid differentiating yourself on the same attributes as everyone else.*

10:45 am – 11:00 am  
Foyer

**Refreshment Break**

11:00 am – 12:00 pm  
FORUM A

**Debit, Credit, & More – Remaining Relevant to Your Member's Payment Habits**  
**Jeff Russell, Executive Vice President, The Members Group**

*Radical changes are taking place in the payments industry. The door is open for an entity to become the center of your members' payment and financial management world. Who will that "entity" be? Learn from Jeff about trends in financial payments and how you can best position your credit union to remain relevant in your members' payment habits.*

12:00 pm – 1:00 pm  
Foyer

**Lunch sponsored by Adapt Telephony Services, LLC**



**1:00 pm – 1:30 pm**  
FORUM A

**“Fire Your Trainers” and More Advice to Make Symposium Stuff Stick**  
**Andy Janning, AVP Training & Quality Service, FORUM Credit Union**

*You'll leave the Symposium with new ideas and innovations for your credit union and members. Your first stop back home may be to your Training department, where you may request, “Make a class that teaches everyone about this fabulous new idea!” Ironically, this approach could be the kiss of death for your innovative brainchild. We'll examine the short, focused list of questions that will radically transform the way in which Training supports organizational innovation and delivers member-focused results.*

**1:30 pm – 2:15 pm**  
FORUM A

**Top 5 Success Practices for Building an Online Community**  
**Morriss Partee, Chief Experience Officer, EverythingCU.com**

*EverythingCU.com started in the year 2000 as an idea, and has since blossomed into an active online community of 5,863 credit union professionals, with a focus on marketing and business development. In this session, Morriss will share the top 5 success strategies that make an online community thrive (as well as be profitable). Credit unions inherently have every one of these success factors available to them, only they currently lie dormant. We'll examine how you can apply each of these practices to revitalize your CU's web presence.*

**2:15 pm – 2:30 pm**  
Foyer

**Refreshment Break**

**2:30pm – 4:00 pm**  
FORUM B  
FORUM C

**Idea eXchange** – led by participants

*This time is for attendees to discuss solutions that have worked for them, present problems for others to offer ideas, and generally collaborate with your peers. Attendees can sign up for a topic/issue they wish to present. FORUM B will focus on Marketing/Business Development topics and FORUM C will focus on Lending/Operations topics. Feel free to move between rooms. For any BarCamp veterans – you can take the lead to show others how this time can be best utilized.*

**6:30 pm – 8:30 pm**  
Grand FORUM

**Dinner & Entertainment**



October 2, 2008

---

8:00 am – 8:45 am  
Foyer

**Breakfast sponsored by ICUL ServiceCorp | Networking**

8:45 am – 9:45 am  
FORUM A

**Engaging with the Social Economy**

**William Azaroff, Interactive Marketing & Channel Manager, Vancity Credit Union**

*A growing segment of the economy is driven by social decision-making. Credit unions play a natural key role in this shift, both as community-focused organizations and as holders of significant consumer assets. This presentation will include examples of the emerging social economy, as well as a case study of ChangeEverything.ca, a social network created by Vancity, which speaks to the values shared by the largest credit union in Canada and the community it serves.*

9:45 am – 10:15 am  
FORUM A

**The Hyperlocal Credit Union – A Vision**

**Matt Dean, CEO, Trabian**

*The Internet connects people across the world, but it also brings together people within a community. Just as hyperlocal media has revolutionized journalism, the hyperlocal credit union can transform the way their members interact with local merchants, with each other, and with their financial institution. Matt will share a snapshot view of a credit union that uses its local focus as more than a "we're from your hometown!" warm and fuzzy feeling to bring tangible value to its members.*

10:15 am – 10:30 am  
Foyer

**Refreshment Break**

10:30 am – 11:15 am  
FORUM A

**Serving the Mobile Member**

**Gene Blishen, General Manager, Mount Lehman Credit Union**

*Still not sure how to best tackle mobile banking or are you looking for alternatives to enhance your current offering? Gene will share valuable member and product information his credit union has gained over the past three years, discuss various aspects of mobile banking and service options, and talk about different approaches for implementing mobile banking (do-it-yourself, vendors, partnering, etc.). Gene concludes with thoughts about "harnessing the wisdom of crowds" and the concept of innovation coming from multiple outside sources and how to ensure your credit union is receptive to these sources.*

11:15 am – 12:00 pm  
FORUM A

**Thrift: The Rise of the Credit Union Warrior**

**Matt Davis, Director of Public Relations, Members Credit Union**

*As the guest speaker contest winner, Matt will reintroduce the concept of promoting thrift for credit unions. He will discuss some of the ways that credit unions across the country are promoting thrift, not only amongst their members, but also amongst the general community. Finally, Matt will introduce some exciting ways that your credit unions can recapture public goodwill with this concept.*

12:00 pm – 1:00 pm  
Foyer

**Lunch & Networking**



**1:00 pm – 1:45 pm**  
FORUM A

### **Turning Business Problems into Business Opportunities**

**Robbie Wright, General Manager, fi-linx**

*How do you turn an obstacle or problem into a potential business opportunity? In this session, Robbie from fi-linx, a CUSO of MaPS Credit Union, will discuss how the CU has taken challenges and turned them into new CUSO ventures and partnerships. He will review the CUSO industry and discuss past and present CUSO ventures, the role that credit union employees play in the formation of new a CUSO, and what the CUSO landscape may look like in the not too distant future.*

**1:45 pm – 2:30 pm**  
FORUM A

### **Improve CU Reputation & Build Loyalty**

**Michelle Bloedorn, Executive Director, Member Loyalty Group**

**Diana Dykstra, CEO, San Francisco Fire Credit Union**

*Six credit unions, including San Francisco Fire CU, have come together to form the Member Loyalty Group CUSO. This CUSO has the goal of spreading the use of the Net Promoter Score among credit unions and making it affordable for institutions of all sizes. Hear about how San Francisco Fire CU has incorporated NPS and social media techniques to engage members and create true loyalty.*

**2:30 pm – 2:45 pm**  
Foyer

### **Refreshment Break**

**2:45 pm – 3:15 pm**  
FORUM A

### **Using Video to Engage Your Target Market**

**Jon DiGregory, Founding Partner, Cantaloupe**

*New ideas for using video to engage your market.*

**3:15 pm – 3:45 pm**  
FORUM A

### **The Credit Union Difference?**

**CU Skeptic, Unveiled**

*“At their current state, credit unions as a whole are no different than banks to the end user.” Since his arrival in the CU blogosphere, the CU Skeptic has been stirring the pot with articles, comments, and interviews based around this central theme. Discover why he thinks “the credit union difference” is largely unapparent in today’s (US) market and what he thinks are the keys to turning the tide of irrelevance. For the first time ever, the CU Skeptic will reveal his true identity and is prepared for an extended Q&A session.*

**3:45 pm – 4:00 pm**

### **Symposium Rewind**

**Ron Shevlin, Senior Analyst, Aite Group**

*So, what did we learn at this event, anyway? Let’s bring it all together and make sure we’re all leaving with new ideas and strategies that will help us better serve our members and engage them in new, relevant ways.*